

IDAHO EMPLOYMENT

A monthly newsletter of the Idaho Department of Labor



Volume 15.11

December 2003 Issue/October 2003 Data

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State Overview

IDAHO'S UNEMPLOYMENT RATE DECREASES TO 5.3 PERCENT

The seasonally adjusted unemployment rate for October 2003 was 5.3 percent, down one-tenth of a percentage point from September. Idaho's October unemployment rate was five-tenths of a percentage point below the 5.8 percent rate experienced one year ago. Idaho's unemployment rate remained below the national rate of 6.0 percent, which decreased one-tenth of a percentage point from September.

There were 3,900 more people working in Idaho in October than in September 2003. This increase followed a small increase (1,900) from August to September. The number of jobless workers in October decreased 500. This is the third consecutive month a decrease in the number unemployed has occurred. As a result, the *Civilian Labor Force*, which includes employed and unemployed individuals, increased to 689,700—the highest level since July.

From one year ago, the number of persons employed in Idaho was up 9,800, or 1.5 percent. The number of persons unemployed decreased by 2,700, or 6.8 percent. The changes from October 2002 show that Idaho's labor force has increased 7,100 persons, or 1.0 percent.

Layoffs that occurred in September and October had more of an impact on the unemployment rates of individual counties as the state-wide labor force measures moved in positive directions. However, several significant layoffs occurred and their effects cannot be minimized: Idaho National Engineering Environmental Laboratory in eastern Idaho, Louisiana-Pacific in North Idaho, and nonseasonal U.S. Forest Service employees in Southwest Idaho. In addition there were closures of the Simplot Meat Products and one processing line at the Simplot potato processing plant in Southwest Idaho. The closure of the J.R. Simplot potato processing plant in Heyburn will be reflected in the November data.

The decrease in the unemployment rate between September and October is the first such change since 1995 when the unemployment rate decreased one-tenth of a percentage point between these two months. During the past 26 years, the September-to-October unemployment rate decreased ten times, remained unchanged ten times, and increased six times.

AREA AND COUNTY LABOR FORCE DEVELOPMENTS

State Table 1 on page 3 provides the month's labor force statistics for Idaho counties, designated labor market areas, and selected cities.

Six Idaho counties experienced double-digit unemployment rates in October, up from four counties in September 2003. Adams County had

the highest unemployment rate at 22.9 percent in October, up from 13.3 percent in September. The increase in Adams County's unemployment rate was the largest in the state as the number of unemployed persons nearly doubled. Washington County's rate of 14.6 percent was up from 11.8 percent in September. Both Adams and Washington Counties, which are neighbors, saw earlier than usual layoffs of U.S. Forest Service and other timber workers. Clearwater County's 10.9 percent unemployment rate was up from 9.6 percent in September. Shoshone County, while at 10.8 percent unemployment in October, improved from its September 12.6 percent rate. The unemployment rate condition worsened in Boundary County as its 8.7 percent rate in September increased to 10.3 percent in October. A 54-person decline in the number of unemployed in Payette County resulted in a 1.5 percentage point decline in the county's unemployment rate, but it still was in the double-digit category for October with a 10.1 percent unemployment rate.

Three counties had unemployment rates below 3.0 percent in October: Madison at 1.6 percent, which was up from 1.1 percent in September; Owyhee at 1.9 percent, down from 2.4 percent in September; and Franklin at 2.9 percent, unchanged from September. Nine additional counties had unemployment rates below 4.0 percent in October.

The October unemployment rates for Idaho's eight designated Labor Market Areas (LMAs), which includes two Metropolitan Statistical Areas (MSAs), range from a low of 3.8 percent in the Bonneville LMA to a high of 7.7 percent in the Panhandle LMA. The Boise City MSA (Ada and Canyon Counties) had a 5.0 unemployment rate in October, a slight improvement from September's 5.3 percent rate.

NONFARM PAYROLL JOBS

State Table 2 on page 5 provides state industry employment data for the current month, previous month, and one year ago.

Summary

The total number of *Nonfarm Payroll Jobs* in October declined marginally from September, but was substantially above last year's level. Industries that reported an increase in jobs in October include: *Transportation, Warehousing & Utilities; Administrative & Support Services (Employment Placement Agencies); and Educational Services*—both public and private. Industries with non-seasonal declines included *Sawmills & Wood Preservation; Food Manufacturing; Real Estate & Rental & Leasing; and State Government Administration*. From January through October 2003, *Nonfarm Payroll Jobs* employment has increased by 36,000 jobs for a 6.5 percent increase.

Highlights

The October preliminary estimate of total *Nonfarm Payroll Jobs* is 586,400. This is 100 jobs fewer than the revised estimate of 586,500 jobs for September. However, the October 2003 estimate is an increase of 10,100 jobs from the October 2002 benchmarked level of 576,300. A change of 100 for a number in the 586,000 range hardly registers. The noted decline could be a result of number rounding. Estimating algorithms suggest that an estimate is just a point in a probable range. That is why the monthly job estimates are examined at least two more times and revisions occur. For example, the November issue of *Idaho Employment* published the September 2003 estimate for Idaho's *Nonfarm Payroll Jobs* as 585,900. The September re-

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IDAHO EMPLOYMENT is produced by the Idaho Department of Labor which is funded at least in part by federal grants from the United States Department of Labor. Costs associated with this specific publication are available by contacting the Idaho Department of Labor. Questions and comments can be directed to Public Affairs by phoning (208) 332-3570, ext. 3220, or by e-mail to:

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vised estimate included in State Table 2 on page 5 is 586,500—a difference of 600 more jobs that the preliminary estimate. Next February the revised estimates will be compared to the employment counts received through mandatory employer reporting for Unemployment Insurance tax purposes and adjusted accordingly, so the number will likely change slightly again. This procedure is called benchmarking.

October's job count, whether preliminary or revised, indicates a slower pace of job growth occurred between September and October than had been experienced for most of the year. A decline of 1,500 jobs in the *Goods-Producing Industries* was barely enough to trump the 1,400 jobs gain in the *Service-Providing Industries*. The *Goods-Producing Industries* also had 2,700 fewer jobs than one year ago, but this loss was covered by the 12,800-jobs increase in *Service-Providing Industries* for an overall 1.8 percent growth rate year-over-year.

Logging and its associated industry, *Wood Product Manufacturing*, lost 100 jobs each from September to October. Even though the demand for lumber has been strong for several years and prices have increased recently nationally, these Idaho industries have not increased their job counts. In fact, Idaho sawmills continue to close or cut back their work forces. The year-over-year job losses in these industries totaling 1,000 support the opinion that the monthly job loss is not due entirely to seasonal factors. Rather, the forest product industries in general have suffered from excess production capacity nationally, and the import of cheaper wood products gives strong competition to domestic producers. The Idaho industry faced these same conditions, but also has had to deal with restricted timber harvests on federal lands, old mills, and mill retooling with an emphasis on cutting smaller diameter trees. The recent spike in the demand for plywood-type products, including oriented strand boards, largely bypassed Idaho because the state's mills do not produce much of these products. Congress is considering major legislation concerning how the U.S. Forest Service should manage the federal timberlands. Among other provisions, forest management is to place more emphasis on thinning forests and cutting down diseased or dead trees in order to mitigate the potential for very large forest fires. Implications for Idaho might include more work for sawyers, more timber for sale to Idaho mills, and more expedited processes for approving the logging activity. However, if large diameter trees are cut, some mills that have retooled might not be willing to purchase the logs. Thinning will likely make available more smaller diameter trees for milling, but Idaho mill

State Table 1: October 2003 Labor Force (preliminary)

Seasonally Adjusted	Labor Force	Unemp.	% Unemp.	Total Emp.
Seaport LMA	35,192	1,572	4.5	33,620
Nez Perce County	22,881	840	3.7	22,041
Asotin County, WA	12,311	732	5.9	11,579
Boise City MSA	246,661	12,422	5.0	234,239
Ada County	176,582	7,336	4.2	169,246
Canyon County	70,079	5,086	7.3	64,993
Pocatello City MSA*	40,929	1,969	4.8	38,959
Bonneville LMA	82,919	3,161	3.8	79,758
Bingham County	22,163	1,005	4.5	21,159
Bonneville County	49,040	1,688	3.4	47,352
Butte County	1,546	82	5.3	1,464
Jefferson County	10,170	387	3.8	9,783
Cassia-Minidoka LMA	20,131	1,263	6.3	18,869
Cassia County	10,122	570	5.6	9,551
Minidoka County	10,009	692	6.9	9,317
Idaho-Lewis LMA	8,084	604	7.5	7,480
Idaho County	6,620	534	8.1	6,086
Lewis County	1,464	70	4.8	1,394
Panhandle LMA	91,536	7,059	7.7	84,476
Benewah County	4,203	396	9.4	3,807
Bonner County	17,484	1,212	6.9	16,272
Boundary County	4,466	459	10.3	4,007
Kootenai County	59,058	4,308	7.3	54,750
Shoshone County	6,325	684	10.8	5,641
Magic Valley LMA	54,960	2,315	4.2	52,646
Gooding County	7,638	239	3.1	7,399
Jerome County	10,247	459	4.5	9,787
Twin Falls County	37,076	1,617	4.4	35,459
Adams County	2,072	475	22.9	1,597
Bear Lake County	3,173	156	4.9	3,016
Blaine County	12,478	447	3.6	12,031
Boise County	2,679	186	7.0	2,492
Camas County	505	43	8.5	462
Caribou County	3,204	279	8.7	2,925
Clark County	548	26	4.8	522
Clearwater County	3,668	399	10.9	3,269
Custer County	2,410	144	6.0	2,266
Elmore County	9,656	613	6.3	9,043
Franklin County	5,566	160	2.9	5,406
Fremont County	4,871	249	5.1	4,622
Gem County	5,918	455	7.7	5,463
Latah County	15,922	579	3.6	15,343
Lemhi County	4,039	265	6.6	3,774
Lincoln County	2,178	79	3.6	2,099
Madison County	11,796	186	1.6	11,610
Oneida County	1,776	62	3.5	1,714
Owyhee County	4,212	82	1.9	4,130
Payette County	9,438	956	10.1	8,483
Power County	3,126	301	9.6	2,825
Teton County	3,990	140	3.5	3,849
Valley County	3,894	330	8.5	3,564
Washington County	4,315	631	14.6	3,684
State of Idaho	689,661	36,876	5.3	652,785
Idaho Cities				
Boise	116,489	4,743	4.1	111,746
Coeur d'Alene	20,770	1,189	5.7	19,580
Idaho Falls	29,718	1,104	3.7	28,614
Lewiston	19,552	642	3.3	18,910
Nampa	21,468	1,754	8.2	19,714
Pocatello	28,821	1,406	4.9	27,415
Twin Falls	19,258	909	4.7	18,348

* Pocatello MSA includes all of Bannock County.

owners/operators will need to find new markets for their inventories of the lumber and other wood products.

The 700 monthly job loss in *Construction* is probably due to seasonal factors as many heavy construction projects are scheduled only for the warm weather months. Demand for residential and commercial building construction remains high as it has throughout the year. Already several areas of the state have set records for building permit issuances and values within a calendar year. The number of jobs in October 2003 was 1,400 more than in October 2002. The outlook for *Construction* employment remains good, although it is thought the state's hectic construction growth pace will slow down due to inventory build-up, slower population growth, and, possible higher interest rates.

The month-over-month loss of *Manufacturing* jobs was confined primarily to two industries: *Other Durable Goods* and *Food Manufacturing*. The residual category of *Other Durable Goods* in Idaho includes furniture; medical supplies; and glass, stone, and concrete products. None of the primary firms in these industries reported specific cutbacks other than through attrition and hiring moratoriums. Therefore, the loss of 300 jobs in this category is a result of fewer jobs spread throughout the sector. On the positive side, the number of jobs this October is 300 more than last October.

The plight of Idaho's *Food Manufacturing* has been discussed in almost every issue of *Idaho Employment* this year. So the October report is much the same as the employment effects of previously announced plant closures, shift reductions, and adjustments to changing market conditions play out. Most of the monthly and year-over-year job losses have been at the food processing plant level with the production of frozen French fries held as the example of how this industry is structurally changing in Idaho. Recently, however, an ice cream plant and a meat plant have closed. The other meat packing plants have encountered a 6.0 percent decrease in red meat production and are facing a 4.0 percent reduction in the number of cattle on feed prior to processing. Cheese prices have been volatile with the current condition termed "soft." These conditions resulted in a loss of 300 jobs from September and 1,000, or nearly 6.0 percent, from October 2002 to October 2003.

Computer & Electronic Products Manufacturing remained at the 16,000 jobs level in October. This level has remained the same since February 2003 at which time Micron Technology, Inc. laid off about 1,100 workers. This layoff, plus other contractions in the in-

dustry, is the explanation for the year-over-year decline of 1,800 jobs. As the national economy improves and business investments are undertaken, the Idaho electronics industry should be positively affected, although employment increases might be slow in coming due to the global surplus of manufacturing capacity.

The message contained in the numbers for the *Service-Providing Industries* is within the columns detailing this year's employment as compared to the employment numbers for October 2002 (see State Table 2 on page 5). With only a couple of exceptions, all of the industries have added jobs over the year. This signifies widespread vitality within this industry classification super sector that has over 80 percent of the state's *Nonfarm Payroll Jobs*.

The *Leisure & Hospitality* sector is the only one among the *Service-Providing Industries* to have a significant loss of jobs from September to October, and all of its subsector industries contributed to the job loss. This is due to the seasonal nature of Idaho's tourism and recreational industries. October in these industries is known as "slack" as the state is in the transition from warm weather activities to cold weather ones. Except for *Accommodations*, these industries still had more jobs after the layoffs than they did last October. Business travel in particular has been down because of cost-saving measures necessitated by the recession and lingering effects of the September 11 events.

The additional jobs created in *State & Local Government Education* is due to finalizing the hiring of supportive staff and work-study students, and adjusting teacher staffing according to the new year's student enrollment patterns. The year-over-year change in *State Government Education* is likely due to more work-study students than school staffing increases.

There are approximately 250,000 students enrolled in Idaho's public K-12 school system and 60,300 students in the state's public colleges, universities, and community colleges.* About 12,800 students attend the three private colleges/universities in Idaho. There are about 15 private elementary/secondary schools (church-related, charter schools, or other private) in the state as well as private vocational training schools. Enrollment in the public higher education system has increased every year since 1997 with the increase from fall semester 2002 to fall semester 2003 totaling 2,108 students for a 3.6 percent growth rate.

*All data on public higher education is from the Idaho State Board of Education.

Continued on page 22

State Table 2: Nonfarm Payroll Jobs

	% Change From				
BY PLACE OF WORK	Oct 2003*	Sept 2003	Oct 2002	Last Month	Last Year
Nonfarm Payroll Jobs**	586,400	586,500	576,300	0.0	1.8
GOODS-PRODUCING INDUSTRIES	105,900	107,400	108,600	-1.4	-2.5
Natural Resources & Mining	3,500	3,600	4,300	-2.8	-18.6
Logging	1,800	1,900	2,400	-5.3	-25.0
Mining	1,700	1,700	1,900	0.0	-10.5
Metal Ore Mining	500	500	500	0.0	0.0
Construction	40,000	40,700	38,600	-1.7	3.6
Manufacturing	62,400	63,100	65,700	-1.1	-5.0
Durable Goods	38,400	38,800	40,500	-1.0	-5.2
Wood Product Manufacturing	7,300	7,400	7,700	-1.4	-5.2
Sawmills & Wood Preservation	2,900	3,000	3,100	-3.3	-6.5
Veneer & Engineered Products	1,400	1,300	1,300	7.7	7.7
Other Wood Product Manufacturing	3,000	3,100	3,300	-3.2	-9.1
Fabricated Metal Product Manufacturing	3,700	3,700	3,700	0.0	0.0
Machinery Manufacturing	2,600	2,600	2,900	0.0	-10.3
Computer & Electronic Product Manufacturing	16,000	16,000	17,800	0.0	-10.1
Transportation Equipment Manufacturing	2,300	2,300	2,200	0.0	4.5
Other Durable Goods	6,500	6,800	6,200	-4.4	4.8
Nondurable Goods	24,000	24,300	25,200	-1.2	-4.8
Food Manufacturing	16,000	16,300	17,000	-1.8	-5.9
Fruits & Vegetable Preserving & Specialty	8,100	8,500	9,000	-4.7	-10.0
Paper Manufacturing	1,600	1,700	1,700	-5.9	-5.9
Printing & Related Support Activities	2,000	2,100	2,000	-4.8	0.0
Chemical Manufacturing	1,800	1,800	1,900	0.0	-5.3
Other Nondurable Goods	2,600	2,400	2,600	8.3	0.0
SERVICE-PROVIDING INDUSTRIES	480,500	479,100	467,700	0.3	2.7
Trade, Transportation, & Utilities	119,100	119,000	116,900	0.1	1.9
Trade	99,700	99,700	97,900	0.0	1.8
Wholesale Trade	25,300	25,300	24,800	0.0	2.0
Wholesalers, Durable Goods	11,500	11,500	11,800	0.0	-2.5
Wholesalers, Nondurable Goods	11,400	11,400	11,200	0.0	1.8
Retail Trade	74,400	74,400	73,100	0.0	1.8
Motor Vehicle and Parts Dealers	10,900	11,000	10,800	-0.9	0.9
Building Material and Garden Equipment	8,100	8,300	7,800	-2.4	3.8
Food & Beverage Stores	12,500	12,500	12,800	0.0	-2.3
General Merchandise Stores	15,900	15,700	14,800	1.3	7.4
Transportation, Warehousing, & Utilities	19,400	19,300	19,000	0.5	2.1
Utilities	1,900	1,900	1,900	0.0	0.0
Transportation & Warehousing	17,500	17,400	17,100	0.6	2.3
Rail Transportation	1,300	1,300	1,300	0.0	0.0
Truck Transportation	8,600	8,600	8,300	0.0	3.6
Information	9,200	9,300	9,100	-1.1	1.1
Telecommunications	3,300	3,300	3,200	0.0	3.1
Financial Activities	27,400	27,700	25,600	-1.1	7.0
Finance & Insurance	20,500	20,600	19,100	-0.5	7.3
Real Estate & Rental & Leasing	6,900	7,100	6,500	-2.8	6.2
Professional & Business Services	76,100	75,600	70,700	0.7	7.6
Professional, Scientific, & Technical	29,700	29,400	28,500	1.0	4.2
Scientific Research & Development	7,500	7,500	7,300	0.0	2.7
Management of Companies & Enterprises	8,800	8,900	8,500	-1.1	3.5
Administrative & Support & Waste Management	37,600	37,300	33,700	0.8	11.6
Administrative & Support Services	36,700	36,500	32,600	0.5	12.6
Educational & Health Services	61,800	61,300	61,100	0.8	1.1
Educational Services	7,000	6,500	6,900	7.7	1.4
Health Care & Social Assistance	54,800	54,800	54,200	0.0	1.1
Hospitals	13,300	13,200	13,500	0.8	-1.5
Leisure & Hospitality	53,400	56,600	52,800	-5.7	1.1
Arts, Entertainment, & Recreation	7,300	8,600	7,000	-15.1	4.3
Accommodation & Food Services	46,100	48,000	45,800	-4.0	0.7
Accommodation	6,500	7,400	7,200	-12.2	-9.7
Food Services & Drinking Places	39,600	40,600	38,600	-2.5	2.6
Other Services	17,700	18,100	17,600	-2.2	0.6
Total Government	115,800	111,500	113,900	3.9	1.7
Federal Government	14,300	15,000	13,600	-4.7	5.1
State & Local Government	101,500	96,500	100,300	5.2	1.2
State Government	30,100	29,200	29,600	3.1	1.7
State Government Education	15,000	13,700	14,400	9.5	4.2
State Government Administration	15,100	15,500	15,200	-2.6	-0.7
Local Government	71,400	67,300	70,700	6.1	1.0
Local Government Education	37,600	34,100	37,600	10.3	0.0
Local Government Administration	30,800	30,200	30,400	2.0	1.3
Local Government Tribes	3,000	3,000	2,700	0.0	11.1

*Preliminary Estimate

** Estimates include all full or part time wage and salary workers who worked or received pay in the following industry groups during the pay period ending nearest the 12th of the month.

State Table 3: Economic Indicators

	Oct 2003	Sept 2003	Oct 2002	% Change From	
				Last Month	Last Year
IDAHO LABOR FORCE ⁽¹⁾					
<i>Seasonally Adjusted</i>					
Civilian Labor Force	689,700	686,300	682,600	0.5	1.0
Unemployment	36,900	37,400	39,600	-1.3	-6.8
Percent of Labor Force Unemployed	5.3	5.4	5.8		
Total Employment	652,800	648,900	643,000	0.6	1.5
<i>Unadjusted</i>					
Civilian Labor Force	687,700	689,100	681,900	-0.2	0.9
Unemployment	30,700	31,200	33,100	-1.6	-7.3
Percent of Labor Force Unemployed	4.5	4.5	4.9		
Total Employment	657,000	657,900	648,800	-0.1	1.3
U. S. UNEMPLOYMENT RATE ⁽²⁾	6.0	6.1	5.8		
U.S. CONSUMER PRICE INDEX ⁽²⁾					
Urban Wage Earners & Clerical Workers (CPI-W)	180.7	181.0	177.3	-0.2	1.9
All Urban Consumer (CPI-U)	185.0	185.2	181.3	-0.1	2.0
AGRICULTURE					
Agriculture Employment	48,460	46,160	42,850	5.0	13.1
Operators	9,010	9,010	9,010	0.0	0.0
Unpaid Family	360	360	740	0.0	-51.4
Hired Workers	39,090	36,790	33,100	6.3	18.1
UNEMPLOYMENT INSURANCE					
<i>Claims Activities</i>					
Initial Claims ⁽³⁾	10,960	9,131	10,866	20.0	0.9
Weeks Claimed ⁽⁴⁾	64,209	73,772	59,800	-13.0	7.4
<i>Benefit Payment Activities⁽⁵⁾</i>					
Weeks Compensated	52,750	62,036	55,367	-15.0	-4.7
Total Benefit \$ Paid	\$11,724,796	\$13,578,814	\$12,140,855	-13.7	-3.4
Average Weekly Benefit Amount	\$222.27	\$218.89	\$219.28	1.5	1.4
Covered Employers	41,509	41,435	40,507	0.2	2.5
Total Benefit \$ Paid During Last 12 Months ⁽⁴⁾	\$218,551,345	\$218,967,404	\$211,171,466	-0.2	3.5

(1) Preliminary Estimate

(2) Source: U.S. Bureau of Labor Statistics

(3) Includes all entitlements/programs on Intrastate and Interstate Agent, New, and Additional Claims

(4) Includes all entitlements/programs, Intrastate and Interstate Agent

(5) Includes all entitlements/programs, Total Liabilities



PANHANDLE

BENEWAH, BONNER, BOUNDARY, KOOTENAI, & SHOSHONE COUNTIES

EMPLOYMENT TRENDS

An indication that the Panhandle's economy is picking up steam is the drop of the seasonally adjusted unemployment rate from 7.9 percent in September to 7.7 percent in October. The unemployment rate was six-tenths of a percentage point lower than the same month the year before. See Panhandle Table 1 for details.

The Panhandle lost approximately 1,190 *Nonfarm Payroll* jobs between September and October, which is a normal job loss between September and October. Comparing October 2003 to the same month the year before provides more evidence that the economy is picking up. In those 12 months, the Panhandle added about 1,020 *Nonfarm Payroll* jobs with more sectors gaining jobs than losing jobs. The sector experiencing the greatest job loss—*Professional & Business Services*—is the sector that experienced the greatest job gains between 2001 and 2002. That sector's losses are the result of layoffs at call centers and downsizing of professional employment organizations (PEOs). One reason for re-joining is the 130 jobs gained in *Manufacturing* between October 2002 and October 2003. Job gains at a variety of manufacturing operations in the 12-month period helped offset the 140 jobs lost when Louisiana-Pacific closed its Bonners Ferry mill September 19.

This year, the Panhandle ski areas have been blessed with abundant, powdery snow. All three opened by Thanksgiving. Last year, lack of snow prevented the Panhandle ski areas from opening until late December. Even after they opened, poor snow conditions persisted, keeping skiers and snowboarders away through Christmas week, the most lucrative week of the year. The weather so far this year suggests that this year will be much more profitable for the ski areas and for the other retail and service businesses that rely on skiers, snowboarders, and snowmobilers.

AREA DEVELOPMENTS

Benewah County

- Economy Hardware on St. Maries' Main Avenue will close at the end of 2003. The hardware store has operated at the same location for 56 years. Some

Panhandle Table 1: Labor Force & Employment

	Oct 2003*	Sept 2003	Oct 2002	% Change From	
				Last Month	Last Year
INDIVIDUALS BY PLACE OF RESIDENCE					
Seasonally Adjusted					
Civilian Labor Force	91,540	92,760	91,660	-1.3	-0.1
Unemployed	7,060	7,290	7,600	-3.2	-7.1
% of Labor Force Unemployed	7.7	7.9	8.3		
Total Employment	84,480	85,470	84,060	-1.2	0.5
Unadjusted					
Civilian Labor Force	90,240	92,820	90,480	-2.8	-0.3
Unemployed	5,620	5,460	6,120	2.9	-8.2
% of Labor Force Unemployed	6.2	5.9	6.8		
Total Employment	84,620	87,360	84,360	-3.1	0.3
JOB BY PLACE OF WORK					
Nonfarm Payroll Jobs** - NAICS	71,290	72,480	70,270	-1.6	1.5
Goods-Producing Industries	14,300	14,340	13,760	-0.3	3.9
Natural Resources & Mining	1,640	1,640	1,720	0.0	-4.7
Construction	5,590	5,500	5,100	1.6	9.6
Manufacturing	7,070	7,200	6,940	-1.8	1.9
Wood Product Manufacturing	2,710	2,830	2,890	-4.2	-6.2
Other Manufacturing	4,360	4,370	4,050	-0.2	7.7
Service-Providing Industries	56,990	58,140	56,510	-2.0	0.8
Trade, Transportation, & Utilities	13,790	13,870	13,410	-0.6	2.8
Wholesale Trade	1,450	1,470	1,360	-1.4	6.6
Retail Trade	10,560	10,610	10,350	-0.5	2.0
Utilities	390	390	380	0.0	2.6
Transportation & Warehousing	1,390	1,400	1,320	-0.7	5.3
Information	1,110	1,130	1,240	-1.8	-10.5
Financial Activities	2,920	2,990	2,910	-2.3	0.3
Professional & Business Services	6,350	6,550	7,020	-3.1	-9.5
Educational & Health Services	7,030	7,040	6,770	-0.1	3.8
Leisure & Hospitality	8,460	9,340	8,130	-9.4	4.1
Other Services	2,110	2,150	2,210	-1.9	-4.5
Government Education	5,250	4,870	5,240	7.8	0.2
Government Administration	8,700	8,910	8,460	-2.4	2.8
Government Tribes	1,270	1,290	1,120	-1.6	13.4

* Preliminary estimate

**Full- or part-time jobs of people who worked for or received wages in the pay period including the 12th of the month

of the hardware's business will be moved to the Tenth Street Lumber Yard, owned by the hardware's owners Jim and Martha Scourey. Lack of business during the last two years forced the Scoureys to close the hardware store.

- This fall, Sharon Smith opened Natural Beauty Salon at 155 South Eighth Street in St. Maries.
- Benewah County Waterways Committee recently increased access for swimmers, fishers, and boaters by adding 300 feet of docks along the St. Joe Riverfront from Aqua Park upstream.

Bonner County

- Sandpoint celebrated the 40th birthday of Schweitzer Mountain Resort on December 4. The recreation area plays a major role in Sandpoint's economy, especially during the winter months. More than 600 people work

for Schweitzer during the ski season. In addition, dozens of other people work for the various businesses in and around Schweitzer Village. The spending by Schweitzer's visitors also keeps many Sandpoint businesses operating through the winter months. Adding joy to the celebration was the rave review *Sunset* magazine gave Schweitzer in the issue that hit the newsstands November 22.

- For the 2003-2004 ski season, Schweitzer added an Activity Center in the White Pine Lodge that refers visitors who are seeking services to local businesses—including dinner reservations, massages, guided snowshoe hikes, snowmobiling, and climbing walls. In addition, the Selkirk Powder Co. opened to offer guided ski tours of the backcountry. Stiles, an outdoor outfitter carrying name-brand equipment, is another new business at Schweitzer Village.
- Blue Moon Café recently opened in the former Ivano's building at 124 South Second in Sandpoint. Owned by Kim Duffy, the café serves a variety of breakfast items, soups, and sandwiches, and employs 10 people.

Boundary County

- The Wreath Farm near Bonners Ferry, owned by Travis and Julie Smith, makes Christmas wreaths and garlands that contain fresh cedar, pine, fir, and spruce. Some wreaths are simple circles, some are shaped like candy canes, others are elaborately decorated. The Wreath Farm's website, along with repeat business, has helped the company expand. Last year, they made 2,300 wreaths; this year, they expected to make 4,000 wreaths for customers around the world.

Kootenai County

- Sysco Corp. plans to build a \$25 million distribution center immediately north of Interstate 90 on the western edge of Post Falls. Sysco is the nation's largest food-service distributor, supplying 420,000 restaurants, hospitals, schools, and other businesses that serve food. Currently Sysco serves the Inland Northwest from Seattle, Portland, and Boise, so the Post Falls center will reduce transportation costs. The 140,000-square-foot center will contain offices, freezers, coolers, and dry storage. When it opens in the spring of 2005, it will employ 150 to 200 people including warehouse workers, truck drivers, and sales, marketing, and accounting staff.
- Phillips Plastics Corp. will close its injection molding plant in Post Falls at the end of 2003, putting 30 people out of work. When the Wisconsin company built the plant at Riverbend Commerce Park in 1996, it expected to increase its customer base in western states. Those expectations never were realized, and increased Asian competition has forced the company to close the Post Falls plant. Phillips is providing transition assistance to the workers affected by the closure. The Coeur d'Alene Job Service also is helping the Phillips workers.

- A 2,700-square-foot Toro Viejo Mexican Restaurant opened in Mid-November next to Super One Foods in Rathdrum. There are four other Toro Viejo restaurants in Kootenai County.
- Businesses recently opening in Post Falls include a 15,500-square-foot Walgreens drugstore at 708 East Seltice Way; All 1 Office, selling computers, computer accessories, other office equipment and supplies, in the Prime Outlets; Petticolas & Son Financial, providing retirement and benefit planning, at 4751 Selway Avenue in Riverbend Commerce Park; and Highlands Day Spa, offering massages and relaxation, as well as a full-service beauty salon, and Plastino's Bistro and Wine Bar, both in the former Highlands Restaurant overlooking Post Falls.

Shoshone County

- American West Bank celebrated the grand opening of its Wallace branch on November 20. The new branch, which is located inside Excell Foods and includes a drive-up window, is a full-service operation offering loans. American West (formerly the Bank of Latah) also has a branch on Railroad Avenue in Kellogg.
- Silver Mountain Resort in Kellogg opened its ski area November 25 with great snow conditions. Earlier this year, Silver Mountain spent \$500,000 to update its gondola, which is the world's longest such gondola. In addition, it cut four new ski runs, expanded its half-pipe, and created a terrain park for beginners. The resort is open seven days a week with night skiing on Friday and Saturday nights. More than 200 people work at Silver Mountain during the ski season. Skiers can visit the new restaurant at the gondola base—Terrible Edith's Bar & Grill—which serves Italian food, steaks, and microbrews on tap. Silver Mountain's owner, Eagle Crest, plans to turn the ski area into a multi-season destination resort, and plans to build a retail village and up to 75 new lodging units over the next few years.
- Lookout Pass Ski Area along Interstate 90 near the Idaho-Montana border added five new ski runs and a double chairlift this year. The runs effectively raised the mountain's vertical drop from 850 feet to 1,150 feet. The additions are part of a \$4 million plan to upgrade the ski area over five years. In 2004, Lookout plans to build a 4,000-square-foot addition on its lodge. Over the next four years, it will add more ski runs and chairlifts. This ski season, Lookout is open five days a week. Traditionally, it has been open four days a week. Lookout, which opened almost two weekends before the larger ski areas, employs about 60 people this ski season.

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SEAPORT

NORTH CENTRAL IDAHO: CLEARWATER, IDAHO, LATAH, LEWIS, & NEZ PERCE COUNTIES

EMPLOYMENT TRENDS

Seaport's seasonally adjusted unemployment rate in October decreased to 4.5 percent from September's rate of 4.8 percent. In October of 2002 the rate was 4.6 percent. Along with the decrease in the unemployment rate, *Nonfarm Payroll Jobs* increased slightly—by 80—in October. Year-over-year, however, there was a significant decrease of 820 jobs. The October 2003 rise in the number of jobs was mainly a result of increases in *Construction* and *Other Services (Private Households)*; however, the increase was slight. Holiday hiring has slowed this year with an increase of only 40 jobs in *Trade, Transportation & Utilities* from October 2002.

SPECIAL TOPIC:

"Think like a Region"

In November, an economic summit was held in Lewiston with business and economic representatives from eight counties of North Central Idaho and Southeastern Washington. The Idaho counties represented were Clearwater, Idaho, Latah, Lewis and Nez Perce. The Washington counties were Asotin, Garfield and Whitman. The goal of the summit was to think like a region and to plan for the future. If communities and regions want to protect themselves against losing jobs to global markets, they need to strengthen their local businesses was the message from one speaker, Michael Shuman, author of "Going Local: Creating Self Reliant Communities." Shuman said that cities, counties, and regions have responded to economic development in one of two ways. Some try to get a Toyota plant in their state. Others pour resources into export industries. Shuman believes those responses are misguided. He advocates that regions conduct surveys to identify what kinds of products their residents are buying out of state. Then they should find ways to keep that business at home. Locally owned businesses make better corporate citizens, Shuman said. Shuman's ideas were similar to those presented by at least one other speaker at the conference, Barry Ramsey, who runs D8 Inc. near Potlatch.

Seaport Table 1: Labor Force & Employment
Nez Perce County, Idaho and Asotin County, Washington

	Oct 2003*	Sept 2003	Oct 2002	% Change From	
				Last Month	Last Year
INDIVIDUALS BY PLACE OF RESIDENCE					
Seasonally Adjusted					
Civilian Labor Force	35,190	35,760	34,570	-1.6	1.8
Unemployment	1,570	1,730	1,580	-9.2	-0.6
% of Labor Force Unemployed	4.5	4.8	4.6		
Total Employment	33,620	34,030	32,990	-1.2	1.9
Unadjusted					
Civilian Labor Force	34,790	35,200	34,300	-1.2	1.4
Unemployment	1,340	1,320	1,340	1.5	0.0
% of Labor Force Unemployed	3.9	3.8	3.9		
Total Employment	33,450	33,880	32,960	-1.3	1.5
JOBS BY PLACE OF WORK					
Nonfarm Payroll Jobs** - NAICS	26,500	26,520	27,420	0.3	-3.0
Goods-Producing Industries	4,370	4,470	4,520	-2.2	-3.3
Natural Resources & Mining	200	170	210	17.6	-4.8
Construction	1,000	1,020	1,150	-2.0	-13.0
Manufacturing	3,170	3,280	3,160	-3.4	0.3
Wood Product Manufacturing	540	550	550	-1.8	-1.8
Food Manufacturing	60	100	90	-40.0	-33.3
Paper Manufacturing	1,220	1,220	1,180	0.0	3.4
Other Manufacturing	1,350	1,410	1,340	-4.3	0.7
Service-Providing Industries	22,130	22,050	22,900	0.4	-3.4
Trade, Transportation & Utilities	5,620	5,550	5,480	1.3	2.6
Wholesale Trade	650	630	650	3.2	0.0
Retail Trade	3,660	3,640	3,530	0.5	3.7
Utilities	90	90	90	0.0	0.0
Transportation & Warehousing	1,220	1,190	1,210	2.5	0.8
Information	370	370	380	0.0	-2.6
Financial Activities	1,610	1,610	1,810	0.0	-11.0
Professional & Business Services	1,380	1,380	1,530	0.0	-9.8
Education & Health Services	3,780	3,780	3,900	0.0	-3.1
Leisure & Hospitality	2,600	2,630	2,680	-1.1	-3.0
Other Services	1,160	1,070	1,120	8.4	3.6
Government Education	2,190	2,230	2,450	-1.8	-10.6
Government Administration	2,550	2,560	2,650	-0.4	-3.8
Government Tribes	870	870	900	0.0	-3.3

*Preliminary Estimate

**Full- or part-time jobs of people who worked for or received wages in the pay period including the 12th of the month

His company makes molds for other factories and employs 40 workers. Running a business gets more difficult as his customers move plants overseas, Ramsey said. In addition, he said he wished economic development professionals would focus more of their energy nurturing business already located in the area rather than seek relocations of large companies from outside the region.

AREA DEVELOPMENTS

Clearwater County

- Seismic Tech, a subsidiary of Plumber One in Carson, California, delayed starting operations in October as originally planned because

some of their new equipment didn't test out to specifications and were sent back to suppliers. This delay, while frustrating to all, is necessary to insure a successful operation. "We have hit some minor speed bumps along the way and the anticipation for hiring is our anxiously awaited goal," stated Jerry Volyn, manager of the Seismic Tech facility located in Orofino's new Business Center. The company will manufacture hand-assembled, individually tested earthquake activated shut-off valves for home and commercial gas pipes. The company plans to employ 100 to 150 workers in the next two years, including assemblers and production managers.

Idaho & Lewis Counties

- It's been 45 years since passengers peered out the windows of a train as it weaved its way down the mountain from Reubens to Culdesac. The six tunnels hollowed through the rock canyon walls have seen few people, other than those on foot, since. But locals and tourists alike will soon be able to take in the rail line across the Camas Prairie as O-Ya Adventures gears up for its inaugural passenger trip shortly after the first of the year. The tourist company has teamed up with BG&CM Railroad to add tourism to a line that soon will be open to freight. The rail trip will be an extension of the tour business O-Ya Adventures is establishing, which offers Lewis and Clark trips as well as general history tours of the area on the roadways. The company plans to use 15-passenger vans with hi-rail capability to take people on the line. Eventually the company hopes to upgrade to a larger bus and then to a self-propelled rail car.

Latah County

- The Pullman-Moscow Regional Airport Board is looking closely at alternative plans that could lead to a new business development park at the airport by the end of this decade. Although six plans are on the table, the preference at an early assessment is one that would move, lengthen, and realign the airport runway and create a 150-acre commercial-industrial park south of the present passenger terminal. The plan could cost up to \$50 million. If approved, the Federal Aviation Administration would cover up to 90 percent of the capital investment costs. That means local units of government and other parties of interest would have to raise up to \$5 million for the project. According to a past study, the airport currently provides \$18 million a year in economic benefit to the Moscow-Pullman area.

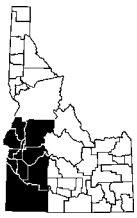
Nez Perce and Asotin Counties

- If all goes as planned, the Asotin County aquatics center should open in the summer of 2004 on Dustan Loop in Clarkston. The outdoor water park will feature three slides, a wave pool, a lazy river, and an adventure pool. The indoor complex will include an eight-lane competition pool, a warm water pool, and

a whirlpool. The entire project is expected to cost about \$9.4 million. Asotin County taxpayers are footing \$6.72 million of the bill and fundraisers have been scrambling to come up with the rest of the funding since the levy was passed last year. Boddell Construction of Missoula, Montana, was awarded the construction contract. Boddell's base bid came in at \$6.65 million. Groundbreaking for the project is scheduled to begin early in November.

- Company officials at munitions manufacturer ATK-CCI/Speer announced the layoff of 20 workers in October in Lewiston. Ken Dolph, vice president of the company formerly known as Blount, categorized the layoffs as part of a "normal business fluctuation" that "required a small adjustment." The layoffs were in the manufacturing division of the company, Dolph said. The ATK-CCI/Speer Lewiston operation employs about 650 people, and manufactures bullets, primers, and ammunition. The Lewiston operation is a division of ATK, which is headquartered in Edina, Minnesota. This round of layoffs follows the company's cut of about a dozen workers earlier this year, Dolph said. The laid off employees have been placed on the company's recall list, according to Dolph. "As positions open up they will be eligible for recall," he said.
- Potlatch Corporation. has reported a profit for the second quarter in a row following three years of losses. "The primary reason for earnings being up for the third quarter and the first nine months of 2003 is we have seen very high prices for wood products," said Michael D. Sullivan, Potlatch's corporate spokesman in October. The company reported third quarter 2003 earnings of \$22.2 million, compared with a loss of \$10.4 million for the same period in 2002. Net sales for the third quarter this year were \$400.3 million, almost a 23 percent increase over the \$326.5 million recorded in the third quarter of 2002. Several things contributed to the upturn in wood products sales in the last quarter, Sullivan said. Housing construction has been strong for several years and about three-fourths of new homes use oriented strand board (OSB). When OSB prices began to climb, buyers who were accustomed to lower prices held off restocking. They held off too long, Sullivan said, and when demand created shortages in their inventories, there was a sudden rush at the start of the second quarter to buy. "As a result, prices escalated quickly." Bad weather and fires in British Columbia also affected timber harvests, so there was a reduction in production at the same time that demands were high.

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TREASURE VALLEY

ADA, ADAMS, BOISE, CANYON, ELMORE, GEM, OWYHEE, PAYETTE, VALLEY, & WASHINGTON COUNTIES

EMPLOYMENT TRENDS

The Boise City Metropolitan Statistical Area's (MSA) average annual unemployment rate for October 2003 was 5.0 percent, as shown in Treasure Valley Table 1. This was three-tenths of a percentage point below the September 2003 rate of 5.3 percent and six-tenths of a percentage point below the October 2002 rate of 5.6 percent. Month-over-month, the number of employed persons increased by 1,300, or 0.6 percent, from September 2003 and the number of unemployed individuals decreased by 700 individuals, or 5.3 percent. The increasing number of persons employed and the decreasing number of persons unemployed created an overall increase of 600 individuals, or 0.2 percent, in the *Civilian Labor Force* from September 2003. Year-over-year, the number of employed persons decreased by 2,400, or 1.0 percent, and the number of unemployed individuals decreased by 1,500 individuals, or 10.8 percent, creating a net decrease in the *Civilian Labor Force* of 3,900 individuals, or 1.6 percent, from October 2002. The *Civilian Labor Force* figures for October

**Treasure Valley Table 2: October 2003
Seasonally Adjusted Labor Force Figures for
Southwest Idaho Counties**

	Civilian Labor Force	Number Unem- ployed	Percent Unem- ployed	Number Employed
Ada	176,582	7,336	4.2	169,246
Adams	2,072	475	22.9	1,597
Boise	2,679	186	7.0	2,492
Canyon	70,079	5,086	7.3	64,993
Elmore	9,656	613	6.3	9,043
Gem	5,918	455	7.7	5,463
Owyhee	4,212	82	1.9	4,130
Payette	9,438	956	10.1	8,483
Valley	3,894	330	8.5	3,564
Washington	4,315	631	14.6	3,684
Statewide	689,661	36,876	5.3	652,785

**Treasure Valley Table 1: Boise MSA Labor Force & Employment
Ada and Canyon Counties**

	Oct 2003*	Sept 2003	Oct 2002	% Change Last Month	% Change Last Year
INDIVIDUALS BY PLACE OF RESIDENCE					
Seasonally Adjusted					
Civilian Labor Force	246,600	246,000	250,500	0.2	-1.6
Unemployment	12,400	13,100	13,900	-5.3	-10.8
% of Labor Force Unemployed	5.0	5.3	5.6		
Total Employment	234,200	232,900	236,600	0.6	-1.0
Unadjusted					
Civilian Labor Force	244,400	243,900	248,200	0.2	-1.5
Unemployment	11,300	11,900	12,600	-5.0	-10.3
% of Labor Force Unemployed	4.6	4.9	5.1		
Total Employment	233,100	232,000	235,600	0.5	-1.1
JOB BY PLACE OF WORK					
Nonfarm Payroll Jobs**	233,000	230,600	231,200	1.0	0.8
GOODS-PRODUCING INDUSTRIES					
Natural Resources & Construction	15,900	15,900	16,300	0.0	-2.5
Manufacturing	30,000	30,300	31,700	-1.0	-5.4
Durable Goods	23,000	23,200	24,600	-0.9	-6.5
Wood Product Manufacturing	1,900	1,900	2,000	0.0	-5.0
Fabricated Metal Products Mfg.	1,400	1,500	1,400	-6.7	0.0
Machinery Manufacturing	1,200	1,200	1,400	0.0	-14.3
Computer & Electronic Manufacturing	14,400	14,400	15,800	0.0	-8.9
Transportation Equipment Mfg.	1,600	1,600	1,600	0.0	0.0
Other Durable Goods	2,500	2,600	2,400	-3.8	4.2
Nondurable Goods	7,000	7,100	7,100	-1.4	-1.4
Food Manufacturing	5,400	5,200	5,300	3.8	1.9
Printing & Related Support Activities	700	700	800	0.0	-12.5
Other Nondurable Goods	900	1,200	1,000	-25.0	-10.0
SERVICE-PROVIDING INDUSTRIES	187,100	184,400	183,200	1.5	2.1
Trade, Transportation, & Utilities	45,200	45,200	44,800	0.0	0.9
Trade	38,000	38,100	37,800	-0.3	0.5
Wholesale Trade	10,600	10,700	10,300	-0.9	2.9
Wholesalers, Durable Goods	6,600	6,600	6,400	0.0	3.1
Wholesalers, Nondurable Goods	2,800	2,800	3,100	0.0	-9.7
Retail Trade	27,400	27,400	27,500	0.0	-0.4
Food & Beverage Stores	4,100	4,200	4,400	-2.4	-6.8
General Merchandise Stores	6,100	6,000	5,900	1.7	3.4
All Other Retail Trade	17,200	17,200	17,200	0.0	0.0
Transportation, Warehousing, & Utilities	7,200	7,100	7,000	1.4	2.9
Utilities	700	600	700	16.7	0.0
Transportation & Warehousing	6,500	6,500	6,300	0.0	3.2
Information	3,600	3,700	3,600	-2.7	0.0
Telecommunications	1,400	1,400	1,300	0.0	7.7
Financial Activities	12,300	12,300	12,100	0.0	1.7
Finance & Insurance	9,300	9,300	8,900	0.0	4.5
Real Estate & Rental & Leasing	3,000	3,000	3,200	0.0	-6.3
Professional & Business Services	34,100	33,500	32,100	1.8	6.2
Professional, Scientific, & Technical	9,400	9,400	10,200	0.0	-7.8
Management of Companies & Ent.	6,800	6,900	6,700	-1.4	1.5
Administrative & Support & Waste Mgmt.	17,900	17,200	15,200	4.1	17.8
Educational & Health Services	28,300	27,800	27,200	1.8	4.0
Educational Services	2,400	2,100	2,200	14.3	9.1
Health Care & Social Assistance	25,900	25,700	25,000	0.8	3.6
Hospitals	9,200	9,000	9,000	2.2	2.2
Leisure & Hospitality	20,000	19,900	19,800	0.5	1.0
Arts, Entertainment, & Recreation	2,900	2,900	2,400	0.0	20.8
Accommodation & Food Services	17,100	17,000	17,400	0.6	-1.7
Accommodation	2,200	2,000	2,000	10.0	10.0
Food Services & Drinking Places	14,900	15,000	15,400	-0.7	-3.2
Other Services	6,800	6,700	6,700	1.5	1.5
Total Government	36,800	35,300	36,900	4.2	-0.3
Federal Government	5,400	5,500	5,400	-1.8	0.0
State & Local Government	31,400	29,800	31,500	5.4	-0.3
State Government	14,100	13,900	14,300	1.4	-1.4
State Government Education	4,400	4,200	4,700	4.8	-6.4
State Government Administration	9,700	9,700	9,600	0.0	1.0
Local Government	17,300	15,900	17,200	8.8	0.6
Local Government Education	10,300	8,900	9,900	15.7	4.0
Local Government Administration	7,000	7,000	7,300	0.0	-4.1

* Preliminary Estimate

**Full- or part-time jobs of people who worked for or received wages in the pay period including the 12th of the month

2003 for all ten counties in Southwest Idaho are shown in Treasure Valley Table 2 on page 11.

In the Boise City MSA *Nonfarm Payroll Jobs* increased by 2,400, or 1.0 percent, from September 2003 to October 2003, while year-over-year, *Nonfarm Payroll Jobs* gained 1,800 jobs, or 0.8 percent, in the Boise City MSA. Month-over-month, *Goods-Producing Industries* lost 300 jobs; job decreases were noted in *Fabricated Metal Products Manufacturing* (-100 jobs), *Other Durable Goods Manufacturing* (-100 jobs), and *Other Nondurable Goods Manufacturing* (-300 jobs), while job gains were noted in *Food Products Manufacturing* (200 jobs). Year-over-year, *Goods-Producing Industries* lost 2,100 jobs, with *Other Durable Goods Manufacturing* (100 jobs) and *Food Product Manufacturing* (100 jobs) the only industries to experience job gains. Job losses occurred in *Natural Resources, Mining, & Construction* (-400 jobs), *Wood Product Manufacturing* (-100 jobs), *Machinery Manufacturing* (-200 jobs), *Computer & Electronic Product Manufacturing* (-1,400 jobs), *Printing and Related Support Activities* (-100 jobs), and *Other Nondurable Goods Manufacturing* (-100 jobs).

In *Service-Providing Industries*, jobs gained outweighed jobs lost by 2,700 in the Boise City MSA from September 2003 to October 2003. Job gains were experienced in *General Merchandise Stores* (100 jobs), *Utilities Services* (100 jobs), *Administrative & Support & Waste Management Services* (700 jobs), *Educational Services* (300 jobs), *Health Care & Social Assistance Services* (200 jobs) primarily *Hospitals* (200 jobs), *Accommodation Services* (200 jobs), *Other Services* (100 jobs), *State Government Education* (200 jobs), and *Local Government Education* (1,400 jobs). Job losses occurred in *Wholesale Trade* (-100 jobs), *Food & Beverage Stores* (-100 jobs), *Information* (-100 jobs), *Management of Companies & Enterprises* (-100 jobs), *Food Services & Drinking Places* (-100 jobs), and *Federal Government* (-100 jobs).

Year-over-year, *Service-Providing Industries* gained 3,900 jobs, with job gains noted in *Durable Goods Wholesale Trade* (200 jobs), *General Merchandise Stores* (200 jobs), *Transportation & Warehousing Services* (200 jobs), *Telecommunications Services* (100 jobs), *Finance & Insurance Services* (400 jobs), *Management of Companies & Enterprises* (100 jobs), *Administrative & Support & Waste Management Services* (2,700 jobs), *Educational Services* (200 jobs), *Health Care & Social Assistance Services* (900 jobs) including *Hospitals* (200 jobs), *Arts, Entertainment, & Recreation Services* (500 jobs), *Accommodation Services* (200 jobs), *Other Services* (100 jobs), *State Government Administration* (100 jobs), and *Local Government Education* (400 jobs). Job losses occurred in *Nondurable Goods Wholesale Trade* (-300 jobs), *Food and Beverage Stores* (-300 jobs), *Real Estate & Rental & Leas-*

ing Services (-200 jobs), *Professional, Scientific, & Technical Services* (-800 jobs), *Food Services & Drinking Places* (-500 jobs), *State Government Education* (-300 jobs), and *Local Government Administration* (-300 jobs). The slow growth of jobs over the year is consistent with the downturn and slow recovery that the national economy has been experiencing since January 2001.

AREA DEVELOPMENTS

Boise City MSA

- A new business assistance program, TEAMS, is being offered free to businesses in Idaho. TEAMS, which stands for TechConnect Entrepreneurship Assistance Methods using Students, is headed by Boise State University (BSU) professor Norris Krueger. The program is designed to help entrepreneurs solve specific business problems while giving university students throughout Idaho hands-on marketing and business experience. Students are already working on semester-long TEAMS projects at BSU, Idaho State University, and BYU-Idaho. TEAMS is a public/private partnership that is supported by BSU, the Idaho Small Business Development Center, the Inland Northwest Research Alliance, the Ewing Marion Kauffman Foundation, the TechConnect centers in Boise, Pocatello, and Post Falls, and Bechtel BWXT Idaho. Entrepreneurs interested in the program can contact Professor Krueger at 426-3573.
- Micron Technology started construction in early November on a new assembly and test facility in Puerto Rico. The 48,000-square-foot building, located in Aguadilla, Puerto Rico, will house advanced technology assembly of DRAM modules and testing for a wide variety of chip modules. The company already has 200 employees working in a temporary facility there.
- Boise Office Equipment announced plans in November to acquire a large amount of Finch-Brown Co., one of its competitors. The company will acquire Finch-Brown's copier, facsimile, and printer division. The acquisition would increase the number of employees by 15 and increase annual revenues by more than a third.
- Saint Alphonsus Regional Medical Center (St. Al's) recently updated its Life Flight equipment. The updates included the addition of an automated flight tracking system, advanced night-vision goggles, and an upgraded dispatch software system. The new equipment will help pilots and flight nurses better navigate weather, dark-

ness, remote and rugged terrain, and improve ground-to-air communication. St. Al's currently operates three helicopters and a plane.

- NomadISP, a new Boise-based company, recently announced plans to market its services nationally. The company provides wi-fi access areas to remote recreation areas throughout the country. NomadISP's equipment receives signals from a satellite and creates a range where wireless Internet access is available. NomadISP is targeting campgrounds as potential customers. The company hopes to sell its first units by early 2004.
- BoDo Partners announced in early November that Metropolitan Rocky Mountain Resort Cinemas (a joint venture of Metropolitan Theatres of Los Angeles and Rocky Mountain Cinemas of Ketchum) would own and operate the 11-screen, 2,200-seat multiplex, currently under construction at the 8th Street site in downtown Boise. The \$7 million cinema is part of the \$62 million redevelopment effort that includes an 11-story building. A Hampton Inn & Suites Hotel will occupy the top seven floors of the building, which will be located at the corner of Capitol Boulevard and Myrtle Street. Other construction plans for the site include a parking garage, retail establishments, and office space. Construction on the hotel and parking garage is expected to be completed in late 2004, while the theater is slated to open in February 2005.
- Vista Village Shopping Center owners announced in early November that the center would undergo an estimated \$4 million facelift. Plans include revitalizing the center's exterior, building up to 14 apartments, and eventually adding a sit-down restaurant on the northern edge of the property. When finished, the shopping center should resemble a village and each store will have its own, unique storefront. Owners hope to keep current tenants and add additional retailers to the shopping center. No start or completion date for the remodel was announced.
- Taco Del Mar, a Seattle-based food chain, recently announced plans to open its first Boise restaurant in January 2004 with three other restaurants scheduled to open in the Treasure Valley by spring—two in Boise and one in Nampa. Taco Del Mar is known best for its Alaskan codfish tacos and mondo burritos. Taco Del Mar's concept is similar to Pollo Rey, Baja Fresh, and Senor Fresh, which all operate eateries in the Treasure Valley.
- Sandstone Plaza, a commercial center, is planned for the corner of Avenue E and Fourth Street in

Kuna. The 13,900-square-foot King's variety store will be renovated and expanded, and a 6,000-square-foot building for a restaurant and bar will be constructed on the other side of the property. The renovated King's building is scheduled to house a gourmet food firm, a wine business, a wireless Internet provider, and other enterprises. The new building is slated to house the Peregrine Restaurant and a tavern. Plans for the remodel are scheduled to begin March 1, 2004, with the additional construction occurring later.

- A five-story, 92,000-square-foot office building is planned for the Meadow Lake Village senior community center in Meridian. The building is being developed to serve the Meadow Lake Village community and to provide additional medical office space to neighboring St. Luke's. Construction of the \$15 million facility is expected to start in March 2004 and be ready for occupancy by January 2005.
- Roaring Springs Water Park in Meridian announced in late November that it plans to open a new youth attraction—Super Splash City. It will include a new slide complex, a kiddie car wash, a fire station, water tunnels, and fountains. Work has already started on the new attraction, which is scheduled to open in summer 2004.
- Horizon Health announced plans in November to construct a new building on Plaza Drive in the Rocky Mountain Business Park in Eagle. The six-year-old clinic will move from its current location in Meridian. Construction on the new building is expected to begin in January 2004 and will include two or three additional tenants. Horizon Health plans to be relocated to the new facility by September 2004.
- The Swiss Village Cheese Company announced the closing of its restaurant and shop in early November. The closure occurred December 31, 2003. Company officials decided that the café and retail shop were not compatible with the growing focus on cheese production at the plant. The closure affected 24 employees who may go to work in other jobs at the plant. Swiss Village is owned by Sorrento Lactalis.
- In other recent business openings in the Boise City MSA, Washington Trust Bank opened a branch in Garden City; Therapeutic Associates opened an office in Boise; Majestic Videos opened in Boise; Hair Cut Up, a new full-service salon, opened in east Boise; Between Friends, an antiques, collectibles, and crafts store opened in Meridian; Bank of America purchased a pad to build

a branch in the Eagle Town & Country Center in Meridian; Vision First LLC and Group One opened separate real estate offices in the River-shore South Office building in the North Channel Center development in Eagle; LaDon's Fine Jewelry opened in Nampa; Big 5 Sporting Goods opened in Karcher Mall in Nampa; Lochsa Group LLC opened a hardware and building supply distribution business in Nampa.

- In other recent business happenings in the Boise City MSA North American Airlines and HawaiianVacations.com's started nonstop service to Maui in November, (some on the nonstop flights were changed to include a stop in Spokane); Dish Network started offering local television stations through its satellite service to the Treasure Valley; the Koppel Browzeville Building on Fairview in Boise has been sold, although no plans were announced for how the space might be used; Red Flag Medical Clinic moved to a new location on State Street in Boise; Snake River Pool & Spa Inc., Everton Mattress & Furniture, and the Children's Store all moved to the new Orchard Center Mall in Boise; REHABworks, Inc. moved into its new facility to Riverside Drive in Garden City; Rocky Mountain Health & Wellness and Freedom West Mortgage moved into a new facility in Eagle; Group One Inc. is expanding its real estate business to Eagle.

Boise County

- Bogus Basin Mountain Resort opened its new tubing hill in mid-November. The resort also opened the mountain to skiers and snowboarders, but quickly had to close it after a warm front moved into the area. The resort reopened to skiers and snowboarders in mid-December.

Elmore County

- Chef Ron's Catering Service opened at 340 North Second East Street in Mountain Home. The catering service can accommodate dinner for two as well as large parties. Chef Ron's Catering also features a small café where customers can enjoy coffee, tea, and a variety of pastries. Also in the café, there is an area featuring hand-made soaps, bath salts, shower gels, and lotions offered by Just 4 U by PatiSu. The café is opened from 6:00 a.m. to 5:00 p.m. Monday through Friday and 10:00 a.m. to 4:00 p.m. on Saturday.

Payette County

- The new McCain Middle School in Payette held a groundbreaking ceremony in early November.

The school is expected to open shortly after the start of the 2004-2005 school year.

Valley County

- Donnelly voters approved forming a Donnelly fire district—The Donnelly Fire Protection District—which will replace the Donnelly Rural Fire Protection Association. The new district covers 185-square miles and will extend to the Adams County line on the west to a point past Gold Fork Hot Springs on the east, north from Lake Fork Road to a line near Lake Cascade's Sugarloaf Island on the south. The district is split into three sub-districts, which are represented on a new board of commissioners.
- McCall Memorial Hospital officials are currently negotiating with property owners to purchase a Masonic Lodge at the corner of State and Hewett Streets and the Payette Lake Christian Center at the corner of West Lake and State Streets in McCall. The addition of these properties would help the hospital meet future growth and offer additional services. The negotiations continue and no final purchase is scheduled. If a sale occurs, the earliest that remodeling on the properties could start would be in 2006.
- Brundage Mountain Resort opened on November 26 for the 2003-2004 season. The resort is expected to open five new runs this winter.

Washington County

- Voters approved a proposal in November for a new multi-purpose facility for Weiser High School. The \$2.8 million bond will fund the construction of the facility that will include a classroom/instructional area, gym space for physical education classes and extracurricular activities, a wrestling room, a fitness/conditioning room, storage areas, adequate shower and toilet accommodations, and an indoor walking track that will be available to patrons outside of school hours. The new building will be located east of the present high school gym. Construction is scheduled to begin in late June 2004 and should be completed in February 2005.

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MAGIC VALLEY

BLAINE, CAMAS, CASSIA, GOODING, JEROME, LINCOLN, MINIDOKA, & TWIN FALLS COUNTIES

EMPLOYMENT TRENDS

The seasonally adjusted unemployment rate for the Magic Valley Labor Market Area (LMA) was 4.2 percent for October 2003. This was unchanged from September and was one-tenth of a percentage point higher than it was in October 2002. The *Civilian Labor Force* increased by 5,310 workers, or 10.7 percent, year-over-year, but the number of unemployed persons was also higher.

Sector analysis shows that *Construction*, *Retail Trade*, and *Professional and Business Services* were strong with year-over-year increases of 5.4 percent, 2.7 percent, and 17.3 percent, respectively. *Transportation* also showed a strong increase of 11.9 percent year-over-year. Sectors that showed decreases over the same time period were *Other Manufacturing*, *Wholesale Trade*, and *Utilities* with decreases of 4.1 percent, 2.2 percent, and 4.8 percent, respectively.

Employment remains stable in the Magic Valley LMA, and 4.2 percent is a good rate given recessionary pressure over the past year. Although *Retail* has stabilized, it consists strongly of workers at large retailers. Small stores and boutiques have shown a slight decrease in employment thus far in 2003, but an increase was anticipated with holiday shopping.

SPECIAL TOPIC:

Is the Economy in Recovery?

Historically, the United States economy has followed a regular business cycle. If viewed as a graph, this business cycle would look like an irregular "sine wave" with defined peaks and valleys. It would be irregular because there would be different spacing between peaks and valleys, depending on how long each phase of the cycle lasted and depending on the depth of each recession or depression. The business cycle phases are roughly: Growth, Prosperity, Decline, Recession, Depression, and Recovery. Depression-like symptoms occurred in the 1830s, as the United States did not have a uniform banking system or currency. After the Civil War, Reconstruction efforts resulted in the same situation. Of course in the 20th Century, the Great Depression lasted roughly from 1929 until the start of World War II. A recession is a marked decline in an economy; a notable

Magic Valley Table 1: Labor Force & Employment
Twin Falls, Jerome, and Gooding Counties

	Oct 2003*	Sept 2003	Oct 2002	% Change From	
				Last Month	Last Year
INDIVIDUALS BY PLACE OF RESIDENCE					
Seasonally Adjusted					
Civilian Labor Force	54,960	53,710	49,650	2.3	10.7
Unemployment	2,320	2,270	2,060	2.2	12.6
% of Labor Force Unemployed	4.2	4.2	4.1		
Total Employment	52,640	51,440	47,340	2.3	11.2
Unadjusted					
Civilian Labor Force	55,200	54,790	50,260	0.7	9.8
Unemployment	1,920	1,870	1,710	2.7	12.3
% of Labor Force Unemployed	3.5	3.4	3.4		
Total Employment	53,280	52,920	48,550	0.7	9.7
JOBS BY PLACE OF WORK					
Nonfarm Payroll Jobs**	43,480	43,250	40,620	0.5	7.0
Goods-Providing Industries	8,160	8,130	7,920	0.4	3.0
Natural Resources & Mining	20	20	30	0.0	-33.3
Construction	2,340	2,350	2,220	-0.4	5.4
Manufacturing	5,800	5,760	5,610	0.7	3.4
Food Manufacturing	3,950	3,820	3,680	3.4	7.3
Other Manufacturing	1,850	1,930	1,930	-4.1	-4.1
Service-Providing Industries	35,330	35,120	32,750	0.6	7.9
Trade, Transportation & Utilities	10,170	10,170	9,830	0.0	3.5
Wholesale Trade	1,810	1,900	1,850	-4.7	-2.2
Retail Trade	5,990	5,960	5,830	0.5	2.7
Utilities	200	160	210	25.0	-4.8
Transportation & Warehousing	2,170	2,150	1,940	0.9	11.9
Information	500	500	500	0.0	0.0
Financial Activities	1,750	1,760	1,680	-0.6	4.2
Professional & Business Services	6,300	6,460	5,370	-2.5	17.3
Educational & Health Services	3,840	3,800	3,070	1.1	25.1
Leisure & Hospitality	3,690	3,700	3,660	-0.3	0.8
Other Services	1,480	1,520	1,490	-2.6	-0.7
Government Education	3,600	3,090	3,030	16.5	18.8
Government Administration	4,000	4,120	4,130	-2.9	-3.1

*Preliminary Estimate

**Full- or part-time jobs of people who worked for or received wages in the pay period including the 12th of the month

recession occurred in the late 1970s through the early 1980s when inflation became extremely high and oil shortages occurred. From late 2000 until the middle of 2003, the United States experienced an unmistakable recession in which unemployment increased dramatically, trade deficits increased, and the manufacturing and volatile technology sectors experienced notable drop-offs in profitability that led to higher joblessness. In the last three months, there has been evidence that recovery has begun. Joblessness is showing signs of lessening, new jobs are being created in notable numbers, and consumer confidence is growing, resulting in increased consumer spending. But is the economy of the United States, Idaho, and South Central Idaho in recovery?

Idaho's economy has always been slightly different than the nation's economy because, as a resource-based state (timber, mining, and agriculture), Idaho's economy is often pulled by the national economy. As a result, Idaho's economy tends to lag behind the national economy by one business cycle phase. For example, when the national economy has been in a growth cycle,

Idaho has tended to be in a stable mode. When the national economy has been in recession, Idaho has merely been in decline. That has changed somewhat in the 21st Century as the Boise area has become more urban and has experienced extreme growth in the technology sector. Though this was beneficial during the tremendous economic boom of the 1990s, the technology and manufacturing sectors experienced marked volatility and economic malaise as the recession occurred. However, Idaho's economy remains mostly rural and many parts of the state never really experienced major growth in the 1990s. These rural areas have remained in a state of decline because the recession of the 1970s and 1980s permanently altered some markets—especially in timber and mining—as consumer demand changed.

South Central Idaho's economy has somewhat mirrored that of rural Idaho. In areas that are more sector-dependent (i.e., food processing), unemployment rates have remained high. For example, the Mini-Cassia area was hard hit by the national recession and potato demand has been soft, resulting in plant closures and layoffs. The Blaine County area is different in that it is heavily dependent upon tourism. Early in the 1980s, unemployment was extremely seasonal and periods of high unemployment occurred when the winter skiing season ended. By concerted effort, area economic developers were able to create more year-round attractions and there were large construction projects that lowered and stabilized unemployment. Many times in the past few years, Blaine County has had one of the lowest unemployment rates in Idaho. Tourism was changed, perhaps forever, on September 11, 2001, as terrorist attacks shifted tourism plans for many Americans. This had a detrimental effect on the Sun Valley area; however, there are signs of recovery and travelers' fears are lessening. Sun Valley's economy depends a great deal on the weather, however, and Idaho has experienced drought conditions.

Western Magic Valley has been a paradox. For the most part, it has been a remarkably strong economy in the face of intense recessionary pressure. Job growth has been outstanding, and entirely new employment sectors have been created in stable technology and light manufacturing. Many new employers have located in the area and hired local workers, and this has improved consumer confidence. Rural Jerome and Gooding Counties have experienced exponential growth in the dairy industry over the last decade, resulting in extremely low and stable unemployment with these new employers, related processors, and others. It has actually changed the entire foundation of the economy in these areas. The Magic Valley LMA has not been immune to recession. For example, Moore North American in Jerome closed in late summer, laying off nearly 100 workers, but the inherent benefits of a diversified economy have mitigated most negative trends. This economy remains one of the hottest economies in the state.

And so, are the national, state, and local economies in recovery? The answer is a qualified "yes." The evidence of national recovery is unmistakable and early indications imply that it is sustainable. Job creation in many sectors has increased and consumer confidence is improving. The holi-

day buying season is off to a strong start. Joblessness has declined. If major factors remain constant, the U.S. economy will continue to recover, albeit very slowly, and it will likely be very fragile.

Idaho also is showing signs of recovery. Consumer confidence is improving. Residential and business construction has benefited from extremely low interest rates and is strong in most, but not all, areas. Retail spending is showing marked improvement in most population centers. Evidence shows that technology manufacturing may be stabilizing; the Boise area has seen recent call center openings and new job creation in that sector. Potato processing jobs are still a serious concern in southern Idaho as the potato and French fry markets remain soft. Mining in North Idaho has shown a few positive flickers of activities. Timber and paper processing are also areas of concern, and a national recovery should at least stabilize those markets.

South Central Idaho's economy should also experience improvement. Already, the Mini-Cassia area has seen new businesses move in. Though these have initially created a small number of jobs, it has contributed to increased confidence. Kraft Foods in Rupert has added 35 jobs. The potato processing market and related farm potato contracting remains a concern and somewhat an unknown, but after the recent closure of the J.R. Simplot Company, it is felt that the job market has bottomed out and that increased national economic activity will provide some positive stimulus. Retail activity has been surprisingly good given job losses, and that should improve with recovery and possible new job creation. It is expected that unemployment rates and overall economic indicators will get worse early in 2004 as 2003 events are captured statistically, and it will take awhile for positive factors to be seen in overall numbers. However, a positive attitude and economic development efforts to diversify the economy gives strong hope to the region. The Sun Valley area is a concern, but mostly from a weather perspective. South Central Idaho has been alarmingly dry for several years. In fact reservoirs are at record lows. Drought conditions put a damper on both summer and winter tourism due to fire danger and lack of snow. If water conditions improve, so does the outlook for the area. Late December snowstorms, however, may help to improve that outlook.

Western Magic Valley should continue its strength. Job growth will probably stabilize rather than show huge growth. *Retail* and *Service* sectors jobs will again be the leaders. Wage outlook remains modest. *Agriculture* is stable if the water year is adequate for summer crops. Beef prices were excellent prior to the recent discovery of a diseased cow in Washington. This event has had an effect on beef prices. The long-term affect is unknown. Dairy prices remain low but relatively stable. And so, like the state and the nation, the outlook is for a slow and fragile recovery with improving conditions over the next two years.

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SOUTHEAST IDAHO

BANNOCK, BEAR LAKE, BINGHAM, CARIBOU, FRANKLIN, ONEIDA, & POWER COUNTIES

EMPLOYMENT TRENDS

The Pocatello Metropolitan Statistical Area's (MSA) seasonally adjusted unemployment rate fell from 5.3 percent in September 2003 to 4.8 percent in October 2003 because two local call centers added jobs, soccer tournaments brought participants and fans to the area, and student employment at Idaho State University increased. The Pocatello MSA's unemployment rate remained below the October 2002 rate of 6.3 percent. Growth in existing businesses, robust construction and real estate activity, and an early harvest contributed to the rate reduction over the year. Labor force and employment information is shown in Southeast Idaho Table 1.

Unemployment rates for the area by county for October 2003, September 2003, and October 2002 are shown in Southeast Idaho Table 2. Most counties experienced at least a slight unemployment rate increase from September to October 2003. Exceptions included Franklin County, whose unemployment rate was unchanged between September and October 2003, and Caribou and Power Counties, whose unemployment rates increased significantly because of reductions in *Food Processing* and *Mining & Manufacturing*. From one year ago, unemployment rate reductions occurred in Bear Lake County, Franklin County, and Oneida County. The ability of individuals who reside in those counties to find work in Utah contributed to the rate reductions. Bingham County's unemployment rate increase of two-tenths of a percentage point year-over-year was most likely because of layoffs at the Idaho National Engineering and Environmental Laboratory. The Pocatello MSA's current

Southeast Idaho Table 1: Labor Force & Employment
Pocatello City MSA (Bannock County)

	Oct 2003*	Sept 2003	Oct 2002	% Change From	
				Last Month	Last Year
INDIVIDUALS BY PLACE OF RESIDENCE					
Seasonally Adjusted					
Civilian Labor Force	40,930	40,980	38,770	-0.1	5.6
Unemployment	1,970	2,170	2,460	-9.2	-19.9
% of Labor Force Unemployed	4.8	5.3	6.3		
Total Employment	38,960	38,810	36,310	0.4	7.3
Unadjusted					
Civilian Labor Force	40,760	40,480	38,700	0.7	5.3
Unemployment	1,780	1,890	2,200	-5.8	-19.1
% of Labor Force Unemployed	4.6	4.7	5.7		
Total Employment	38,980	38,590	36,500	1.0	6.8
JOBS BY PLACE OF WORK					
Nonfarm Payroll Jobs** - NAICS	34,490	34,020	33,920	1.4	1.7
Goods-Producing Industries	4,360	4,380	4,400	-0.5	-0.9
Natural Resources & Mining	10	10	10	0.0	0.0
Construction	1,820	1,820	1,750	0.0	4.0
Manufacturing	2,530	2,550	2,640	-0.8	-4.2
Food Manufacturing	450	470	460	-4.3	-2.2
Fabricated Metal Product Manufacturing	110	110	120	0.0	-8.3
Machinery Manufacturing	30	30	40	0.0	-25.0
Other Manufacturing	1,940	1,940	2,020	0.0	-4.0
Service-Providing Industries	30,130	29,640	29,520	1.7	2.1
Trade, Transportation & Utilities	6,640	6,650	6,660	-0.2	-0.3
Wholesale Trade	990	980	1,050	1.0	-5.7
Retail Trade	4,380	4,410	4,350	-0.7	0.7
Utilities	50	50	50	0.0	0.0
Transportation & Warehousing	1,220	1,210	1,210	0.8	0.8
Information	690	690	690	0.0	0.0
Financial Activities	1,760	1,780	1,800	-1.1	-2.2
Professional & Business Services	3,570	3,420	3,220	4.4	10.9
Educational & Health Services	2,820	2,840	3,070	-0.7	-8.1
Leisure & Hospitality	3,330	3,250	3,280	2.5	1.5
Other Services	1,320	1,310	1,200	0.8	10.0
Government Education	5,740	5,350	5,400	7.3	6.3
Government Administration	4,270	4,350	4,210	-1.8	1.4

*Preliminary Estimate

**Full- or part-time jobs of people who worked for or received wages in the pay period including the 12th of the month

unemployment rate remained below the state's rate of 5.3 percent and the U.S. rate of 6.0 percent.

Nonfarm Payroll Jobs increased by 470 from September to October 2003 to 34,490 jobs. The increase was driven mainly by the addition of jobs at local call centers, and in state and local education as schools adjusted to enrollments.

The *Goods-Producing Industries—Natural Resources & Mining, Construction, and Manufacturing*—lost 20 jobs from September to October. Good weather throughout October allowed construction to continue without normal seasonal reductions, but manufacturing jobs fell slightly from 2,550 to 2,530.

The *Service-Providing Industries—Trade, Transportation & Utilities; Information; Financial Activities; Professional & Business Services; Educational & Health Services; Leisure & Hospitality; and Other Services*—gained 490 jobs over the month.

Southeast Idaho Table 2: County
Unemployment Rate Comparisons

COUNTY	OCT 2003	SEPT 2003	OCT 2002
Bear Lake	4.9	4.5	5.6
Bingham	4.5	4	4.3
Caribou	8.7	6.9	7.2
Franklin	2.9	2.9	3.9
Oneida	3.5	2.9	4.6
Power	9.6	8.9	8.6

The surge in jobs in the *Service-Providing Industries* occurred mainly in three industry groups. *Professional & Business Services* added 150 jobs because two local call centers increased their workforce and temporary staffing agencies added individuals to assist with harvest. *Leisure & Hospitality* added 80 jobs because of special events that increased business at local hotels and restaurants. *Government Education* added 390 jobs as local schools adjusted employment to meet enrollments and Idaho State University increased student employment. Job changes in *Trade, Transportation & Utilities* were mixed, but overall the industry dropped 10 jobs. Exceptionally good weather throughout October kept shoppers out of the stores and reduced jobs in *Retail Trade* (-30), but some of those reductions were offset by a slight increase in *Wholesale Trade* (10) and *Transportation* (10). Normally, shoppers begin buying warm clothing in October, but the warm weather delayed those purchases this year. *Government Administration* dropped 80 jobs from September to October, which is a normal decrease because many summer recreation jobs end for the winter season.

SPECIAL TOPIC: Area Construction

Area construction continued at a strong pace through August 2003, according to the Wells Fargo Idaho Construction Report – August 2003. Southeast Idaho Chart 1 shows that Southeast Idaho construction increased 28.5 percent in 2003 over 2002. Bannock and Bingham Counties led increased construction with gains of 32.5 percent and 46.8 percent, respectively. Bannock County's increased construction activity in 2003 was mostly in commercial construction with a small increase in residential construction. Bingham County increased mostly in residential construction, but also experienced significant gains in commercial construction. Southeast Idaho continued to outpace statewide construction activity, which gained 14.6 percent over 2002.

AREA ECONOMIC DEVELOPMENTS

Please note: Information contained in Economic Developments is obtained from area newspapers, local Job Service offices, trade publications, local area Chambers of Commerce publications, and other sources.

Bannock County

- The federal transportation appropriations committee approved \$1.5 million for the Cheyenne Connector in Pocatello. The appropriation is a part of the Transpor-

tation, Treasury, and Independent Agencies Appropriations bill, and must be approved by the U.S. House of Representatives and the U.S. Senate.

- Portneuf Medical Center has completed plans for a new heart and vascular center. The center will be completed in four phases. The first phase, a \$1.5 million open heart surgical suite and cardiac catheterization lab, will begin in January 2004 and should be completed by July 2004. All phases of the project should be completed and the center fully operational by late 2005.
- Northern Title Company held an open house of their new facility at 1523 Yellowstone in Pocatello. The company completely renovated the old Ponderosa Paint building to accommodate growth. After completing the new facility, the business added two more employees for a total of nine.
- A new restaurant, Riggio's, opened at 230 West Bonneville in Pocatello. The restaurant, located in Old Town Pocatello, boasts an "Old Chicago" atmosphere and likeness. The restaurant serves daily lunch specials, pizza-by-the-slice, and full dinner meals at moderate prices.
- First American Title has begun construction on a new building. The \$1 million-plus, 15,000-square-foot-facility will be located at 2240 East Center in Pocatello. Construction should be completed by June 2005.

Bingham County

- American Family Insurance opened in Blackfoot. The business is located at 715 West Judicial and employs three people.
- A new convenience store, The Pit Stop, opened in Fort Hall. The store is located on Highway 91 and offers self-serve gourmet coffee, breakfast sandwiches, and hot and cold lunch items. The business employs three people and has plans for expansion in the future.

Oneida County

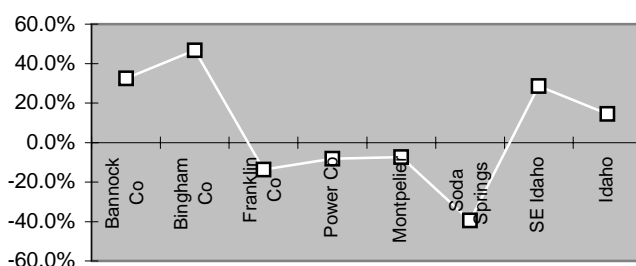
- A new business, The Gift Garden, opened at 220 Bannock Street in Malad. The store is an outlet for a variety of brand name products including log furniture built by a local artist, tools, office supplies, assorted gifts, and handcrafted items.

Power County

- Several businesses in American Falls have remodeled and expanded their operations.
 - » Rockland Pharmacy remodeled their building and added space for Radio Shack to open in their facility.
 - » Hirling Chevrolet purchased Rick's Chevrolet in American Falls. The new owner expanded the business to offer a larger selection of new and used cars.

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Southeast Idaho Chart 1: Southeast Idaho Construction, Percent Change 2002-2003





NORTHEAST IDAHO

BONNEVILLE, BUTTE, CLARK, CUSTER, FREMONT, JEFFERSON, LEMHI, MADISON, & TETON COUNTIES

EMPLOYMENT TRENDS

The October 2003 unemployment rate for the Bonneville Labor Market Area (LMA) was 3.8 percent, an increase of five-tenths of a percentage point from September (see Northeast Idaho Table 1). The increase was due in part to this year's early harvest, which resulted in many agriculture workers being laid off in mid-October, which is earlier than normal. The October unemployment rate was the lowest reported for the state's eight LMAs and Metropolitan Statistical Areas (MSAs). The Bonneville LMA saw an increase of 2,010 people in the *Civilian Labor Force* and an increase of 470 unemployed people from September to October. Year-over-year, the LMA's unemployment rate remained unchanged. Bonneville and Butte Counties experienced decreases in unemployment while Bingham and Jefferson Counties had increases. Overall, however, the LMA's *Civilian Labor Force* decreased 100 people. The unemployment rate for Idaho Falls, the largest city in the LMA, increased five-tenths of a percentage point month-over-month to 3.7 percent, which was one-tenth of a percentage point below the October 2002 rate.

Eight of the nine counties comprising Northeast Idaho showed increases in the unemployment rate over the month. The one exception was Teton County, which decreased six-tenths of a percentage point to 3.5 percent. October's unemployment rate for Northeast Idaho was 3.6 percent. Madison County had the lowest unemployment rate for the region and for the entire state at 1.6 percent; Lemhi County had the highest unemployment rate in the region at 6.6 percent. Teton County relies heavily on winter tourism, so the decrease is a sign that the economy might be returning to normal after be-

Northeast Idaho Table 1: Labor Force & Employment
Bonneville, Bingham, Butte, and Jefferson Counties

	Oct 2003*	Sept 2003	Oct 2002	% Change From	
				Last Month	Last Year
INDIVIDUALS BY PLACE OF RESIDENCE					
<i>Seasonally Adjusted</i>					
Civilian Labor Force	82,920	80,910	83,020	2.5	-0.1
Unemployment	3,160	2,690	3,140	17.5	0.6
% of Labor Force Unemployed	3.8	3.3	3.8		
Total Employment	79,760	78,220	79,880	2.0	-0.2
<i>Unadjusted</i>					
Civilian Labor Force	83,150	82,270	84,140	1.1	-1.2
Unemployment	2,650	2,730	2,650	-2.9	0.0
% of Labor Force Unemployed	3.2	3.3	3.1		
Total Employment	80,500	79,540	81,490	1.2	-1.2
JOB BY PLACE OF WORK					
Nonfarm Payroll Jobs** - NAICS	64,330	65,040	64,340	-1.1	0.0
<i>Goods-Producing Industries</i>	10,950	11,180	10,210	-2.1	7.2
Natural Resources & Mining	70	70	90	0.0	-22.2
Construction	5,960	6,160	4,940	-3.2	20.6
Manufacturing	4,920	4,950	5,180	-0.6	-5.0
Food Manufacturing	2,440	2,370	2,280	3.0	7.0
Fabricated Metal Product Manufacturing	310	320	280	-3.1	10.7
Machinery Manufacturing	450	490	460	-8.2	-2.2
Other Manufacturing	1,720	1,770	2,160	-2.8	-20.4
<i>Service-Providing Industries</i>	53,380	53,860	54,130	-0.9	-1.4
Trade, Transportation & Utilities	14,270	14,230	14,860	0.3	-4.0
Wholesale Trade	4,780	4,720	5,150	1.3	-7.2
Retail Trade	7,550	7,520	7,870	0.4	-4.1
Utilities	100	110	100	-9.1	0.0
Transportation	1,840	1,880	1,740	-2.1	5.7
Information	790	790	870	0.0	-9.2
Financial Activities	1,940	2,050	2,270	-5.4	-14.5
Professional & Business Services	11,600	11,780	11,710	-1.5	-0.9
Educational & Health Services	6,490	6,500	6,110	-0.2	6.2
Leisure & Hospitality	5,010	5,320	4,960	-5.8	1.0
Other Services	2,070	2,090	2,310	-1.0	-10.4
Government Education	5,020	4,580	5,040	9.6	-0.4
Government Administration	6,190	6,520	6,000	-5.1	3.2

*Preliminary Estimate

**Full- or part-time jobs of people who worked for or received wages in the pay period including the 12th of the month

ing affected for the past two years by the nation's economic slump. The total labor force of Northeast Idaho for October was 88,410. Year-over-year changes in the unemployment rates were minimal, with the exception of a 1.6 percentage point decrease in Custer County to 6.0 percent in October 2003. However, since the county population is less than 2,500, it takes very little change in the number of unemployed people to make a large percentage change. Custer County has had an unemployment rate ranging between 5.4 percent and 7.6 percent in 2003 compared to 2002 when it ranged from 6.1 percent to 10.5 percent. Mine closures over the past five years have affected Custer County's employment numbers.

Nonfarm Payroll Jobs in the LMA decreased by 710 jobs from September to October as both tourism and construction declined due to the time of year. *Goods-Producing Industries* showed an overall decrease of 230 jobs (primarily in *Construction*), while *Service-Providing Industries* showed a decrease of 480 jobs (primarily in the *Leisure & Hospitality* and *Government Administration* sectors). The large decreases in these sectors are expected in the fall when tourism and summer activities come to an end. The largest monthly increase is in *Government Education*, which was expected as schools headed back in session.

Year-over-year, the change in total *Nonfarm Payroll Jobs* was marginal with a loss of 10 jobs. Decreases in *Service-Providing Industries* slightly offset the gains in *Goods-Producing Industries*. *Construction* experienced the largest increase—1,020 jobs—with plenty of activity in both Jefferson and Bonneville Counties. The other large increase was in *Educational & Health Services*—380 jobs—as hospitals, medical specialists, and clinics have either remained strong or added new jobs. Heavier losses were noted in *Trade*, as both *Retail* and *Wholesale Trade* lost over 300 jobs each. A nation-wide fad of high-protein, low-fat diets has weakened the potato market, but strengthened the cattle market, although the impact of the recent discovery of a diseased cow in Washington has yet to be measured. Because fresh pack potatoes warehouses are an important component of *Wholesale Trade* in Northeast Idaho, the weak market has resulted in a loss of jobs. *Retail Trade* was in between seasons and the mild weather tempered the sale of winter supplies and related products. *Financial Activities* also decreased by over 300 as last year's struggle in the stock market turned away some wary investors who are shifting interest to real estate instead. The LMA seems to be rich in that area.

AREA DEVELOPMENTS

Bonneville County

- The Snake Bite restaurant moved from River Parkway to the former location of DD Mudd at the corner of Park Avenue and A Street, a few blocks on the other side of the Snake River. The restaurant expanded seating capacity from 27 to 68 and added room for storage. With the majority of the customer base located in downtown Idaho Falls, the restaurant is now in the heart of the city and allows for larger group events.
- Zion's Bank announced it would move across the river to the Taylor Crossing on the River. The bank will be located in the newest large building

at Taylor Crossing on the River on the north side of Pancheri Drive. The mortgage/construction company, along with the main branch, will be moving to the same location. Currently the two businesses are located in separate buildings within a block of each other between Memorial Drive and Capitol Avenue. The new building will open in early 2004.

- Ronson's, a downtown sporting goods store that has been in operation for nearly 40 years at the same location, is closing because the owner is retiring. The business is marking down all inventory for a closing sale. The store started as a wall-paper and paint store, then brought in toys and now sells a little bit of everything including skis, snowboards, bikes, and the accessories that go with them.

Fremont County

- Ashton Memorial Inc. is opening a clinic in Island Park in the spring of 2004. The clinic will be located in a building at Pond's Lodge that is currently used for laundry and showers. It is being remodeled to meet the needs of the clinic. The facility will be open three days per week, but will increase if the demand warrants. Dr. Michael Packer and Nurse Practitioner Roxanna Holmes will provide medical services. Ashton Memorial will provide the building, utilities, and maintenance. Advisory committee members for the clinic are being sought.

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UNEMPLOYMENT INSURANCE TAX RATES UNCHANGED FOR 2004

The factors that determine an employer's Unemployment Insurance (UI) tax bill are to remain at the 2003 levels throughout 2004. This situation is due to a decision of the Idaho State Legislature made during the 2003 legislative session. This decision was based upon the state's economic condition at the time and the projected condition for 2004. The Legislature also expressed its desire to undertake a more thorough examination of Idaho's UI tax structure to possibly make it more responsive to the Idaho economy of the new decade, to the employers, and to the workers.

The essence of an employer's 2004 tax liability is that the appropriate tax rate will be applied to the first \$27,600 paid to each worker employed during the 2004 calendar year. Payment to the employee most likely will be wages, but commissions, bonuses, and non-cash items paid for the personal services also are considered wages.

A Schedule of Taxable Wage Rates establishes the appropriate tax rate for each employer. Wage reports and UI tax remittances are due to the Idaho Department of Labor (IDOL) quarterly. These funds are added to the UI Trust Fund accounts.

All new Idaho businesses that have employees begin with the same standard UI contribution (tax) rate. After a qualifying period of six calendar quarters ending on June 30, a new business that has employees is eligible for a reduced rate during the next calendar year. After that time period employers' tax rates will increase or decrease depending on their individual *experience rating* with the UI program. This rating is calculated by subtracting the employer's accumulated benefit payments from the employer's accumulated tax payments, and then dividing it by the employer's average taxable payroll.

$$\text{EXPERIENCE} = \frac{\text{TAXES PAID} - \text{BENEFITS CHARGED}}{\text{AVERAGE TAXABLE PAYROLL}}$$

The experience rating system applies to most Idaho employers. Public and private non-profit employers generally pay their UI taxes on a cost-reimbursable basis. That is, these employers reimburse the UI tax fund **after** the benefits have been paid.

Experienced employers will have either a positive or negative rating (the formula's quotient), which in turn is ranked within the positive and negative categories. Employers with the highest positive rank will pay the least

taxes; employers with the greatest negative rank will pay the most.

The rank ordering of employers can be overridden by another calculation based upon funds available in the UI Trust Fund, projected benefits to be paid from it, and the amount of new funds or tax receipts needed to maintain the Trust Fund at a prescribed level of adequacy. (Trust Fund fiscal dynamics is a whole other story!) This in turn determines which one of nine tax rate schedules will be used during the year and, consequently, which array of employer tax rates will be used based upon experience rating.

FYI Table 2 (below) is an example of the UI Tax Rates for 2004, assuming an employee earns \$27,600 or more during the year. The actual tax due amounts are determined for each quarter of the year.

Rate Class	Percent per Rate Class	Rate for Positive Rated Employers		Standard Rate for New Employers		Rate for Negative Rated Employers	
		Rate	Tax	Rate	Tax	Rate	Tax
1	12	0.2	55.20	1.5	414.00		
2	12	0.4	110.40				
3	12	0.6	165.60				
4	12	0.8	220.80				
5	12	1.0	276.00				
6	12	1.2	331.20				
7	28	1.4	386.40				
-1	30					2.6	717.60
-2	20					3.0	828.00
-3	15					3.4	938.40
-4	15					3.8	1,048.80
-5	15					4.2	1,159.20
-6	5					5.4	1,490.40
Average Tax for All Employers				331.20			

More information on Idaho's UI Tax system can be found on the Idaho Department of Labor's home page at <http://www.jobservice.us>. Clicking on the Unemployment Insurance tab.

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The state's public higher education system contains an applied technology (vocational-technical training) component and these courses of study offer certificates of training, Associate of Arts degree, or are coupled with academic training to offer a Bachelor's degree. The applied technology courses are delivered by a public higher education facility—either a college/university or a community college—in each area of the state. There currently are 5,824 students enrolled in an applied technology course of study. The state also offers a "Tech-Prep" program in which high school seniors can enroll in a regular post-secondary program as well as other possibilities for high school students to take post-secondary applied technology courses by enrolling part time. Currently 464 high school students are participating in these programs.

Almost all (90 percent) of the public higher education systems students are enrolled in academic programs. Full-time students total 63 percent of the total academic students. At the community colleges, the split between full-time and part-time students is almost fifty-fifty. A substantial number of the college/university part-time students take courses at off-campus facilities such as a local school or community college located outside a reasonable commuting distance of the college. Idaho's geography and vast rural areas necessitates an outreach approach to higher education. A somewhat new and exciting approach is the creation of the Idaho Electronic Campus. The state's public and private colleges and universities are cooperatively providing over 1,200 courses and degree programs long-distance via Internet, television, and radio. Log on to <http://www.idahoe-campus.state.id.us/> to learn more about this higher education opportunity.

Employment in the public education sectors as well as *Educational Services* is dependent upon population demographics and geography, labor market needs, and financial resources. The latter factor has increasingly come into play as costs have risen, student populations have increased, public resources have become more limited, and the demand for more quality in curricula, facilities, instructional expertise, and classroom technological resources has become stronger.

Agriculture

October is one of the peak months for hired agricultural workers. It is harvest time, range livestock roundup and relocation time, apple picking time, winter wheat planting time, and general winterizing

time. It is estimated that 39,090 hired workers in Idaho were engaged in these activities during the month.

October is also when producers of Idaho's major crops will begin to learn the prices they will receive at market. Prices received in mid-October increased from September for alfalfa hay, feed barley, beef cattle, steers and heifers, calves, and all milk. Prices for all barley, dry beans, potatoes, all wheat, and cows declined. Compared to last year, only the cattle categories showed any substantial price increases; and there were troubling declines in prices for alfalfa hay, dry beans, and potatoes sold for all uses. It is too early to determine the prices for sugar beets, although it is estimated that this year's crop will set new state records for production and yield. A shortage of railroad cars needed to transport Idaho wheat to the West Coast could cause higher costs for the grain producer and the commodity broker/seller.

Idaho recently launched a new agricultural product identification and promotion campaign to promote the quality, diversity, and availability of the food and agricultural products grown and processed in Idaho. **IDAHO PREFERRED™** is a voluntary program for Idaho producers who want to take advantage of special branding/logo, promotion, and marketing strategies. There are requirements for product quality, percentage of Idaho product in processed items, and other criteria the producers must agree to follow. This program is designed for all commodities and is in addition to existing marketing programs.

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Ask the Economist

A NEW WAY OF LOOKING AT FAMILIAR EMPLOYMENT DATA

The Idaho Department of Labor recently received a request for establishment employment data in an unusual format. The requestor asked for total nonfarm employment, by month, year-over-year comparisons and how Idaho ranked nationally in terms of percent change in the monthly year-over-year data. FYI Table 2 (below), which presents some of the data gathered for this request, displays the year-over-year change in total seasonally adjusted nonfarm employment for each month since January 2000 through October 2003. Each month's employment number is compared to the same month of the previous year, and the numerical and percentage change calculated. The percentage change rate is then compared to all other states to determine the change rate rank order (descending) of every state.

Notes on Table 2:

- Reading horizontally from January to December for each year shows a fairly consistent pattern in

the level of percent change over the previous year.

- 2000 was a banner year with high numerical and percentage changes, and high national ranking.
- The year-over-year employment suddenly declined in January 2002, and the decline mode lasted for the first six months of that year. This was Idaho's reaction to the national recession, particularly in computer products manufacturing, and the economic slowdown in other industries.

If you have any questions for "Ask the Economist," please e-mail it to: LMI@jobservice.us

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FYI Table 2: Total Nonfarm Employment: Year-Over-Year Change & Idaho's Rank of Percent Change									
	Numerical Difference	Percent Difference	Rank	Numerical Difference	Percent Difference	Rank	Numerical Difference	Percent Difference	Rank
Year	January to January			February to February			March to March		
	2003	600	0.1	18	700	0.1	19	2,700	0.5
2002	-3,300	-0.6	11	-5,300	-0.9	10	-7,400	-1.3	19
2001	16,900	3.1	5	17,100	3.1	3	17,200	3.1	2
2000	19,800	3.7	3	20,500	3.9	3	20,800	3.9	3
	April to April			May to May			June to June		
	2003	1,000	0.2	15	-800	-0.1	27	1,300	0.2
2002	-2,900	-0.5	13	-1,600	-0.3	10	-1,700	-0.3	12
2001	12,300	2.2	4	9,000	1.6	7	9,400	1.7	5
2000	22,500	4.2	1	25,400	4.7	1	21,500	4.0	2
	July to July			August to August			September to September		
	2003	900	0.2	18	6,500	1.1	9	10,400	1.8
2002	1,900	0.3	8	-700	-0.1	15	1,000	0.2	11
2001	7,500	1.3	6	6,900	1.2	8	4,000	0.7	7
2000	19,000	3.5	4	21,300	3.9	4	20,700	3.8	4
	October to October			November to November			December to December		
	2003	10,100	1.8	3					
2002	3,000	0.5	10	5000	0.9	9	5000	0.9	8
2001	2,200	0.4	9	4700	0.8	7	2700	0.5	9
2000	18,200	3.3	4	17900	3.3	4	18200	3.3	4
Source: Idaho Department of Labor, December 2003									

Source: Idaho Department of Labor, December 2003

Glossary of Labor Market Terms

Agriculture Employment: Persons on agriculture payrolls who work or receive pay for any period during the survey week. This includes owners, operators, unpaid family members who work at least 15 hours a week, and hired laborers.

Average Hourly Earnings/Average Weekly Hours: The average total money earnings earned by production or non-supervisory workers for selected industries. The average number of hours worked by production or non-supervisory workers including overtime, paid vacation, and sick leave. The data is collected for the week including the 12th of the month.

Average Weekly Earnings: Average Hourly Earnings multiplied by Average Weekly Hours.

Civilian Labor Force: A count of non-institutional persons 16 years of age and over residing within a specific geographic area, excluding members of armed forces, who are classified as employed, unemployed and seeking employment, or involved in a labor dispute.

Consumer Price Index (CPI): A national index measuring changes over time in the price of a fixed market basket of goods and services. There are two indexes—the All Urban Consumers (CPI-U) represents the buying habits of about 80 percent of the non-institutional population of the United States, and the Urban Wage & Clerical Workers (CPI-W) represents 40 percent of the population.

Covered Employers: Employers who are subject to state and federal Unemployment Insurance laws.

Durable Goods: Also known as “hard goods” because they include items manufactured or provided by wholesalers with a normal life expectancy of three years or more.

Employed: Individuals, 16 years of age or older, who worked at least 1 hour for pay or profit or worked at least 15 unpaid hours in a family business during the week including the 12th day of the month. Individuals are also counted as employed if they had a job but did not work because they were: ill, on vacation, in a labor dispute, prevented from working because of bad weather, or temporarily absent for similar reasons.

Initial Claim: Any notice of unemployment filed to request (1) a determination of entitlement to and eligibility for compensation or (2) a second or subsequent period of unemployment within a benefit year or period of eligibility.

Labor Market Area (LMA): An area that consists of a central city or cities and the surrounding territory within commuting distance. It is an economically integrated geographic area within which individuals can reside and find employment without changing place of residence. Idaho has nine LMAs.

Metropolitan Statistical Area (MSA): An area that has either a city with a population of at least 50,000 or a Bureau of Census urbanized area of at least 50,000 and a

total metropolitan area of at least 100,000. The Office of Management and Budget designates the MSAs. There are five MSAs in Idaho—Boise City-Nampa MSA (including Ada and Canyon Counties), Coeur d’Alene MSA (Kootenai County), Idaho Falls MSA (Jefferson and Bonneville Counties), Lewiston MSA (Nez Perce County in Idaho and Asotin County in Washington), Logan MSA (Franklin County and the Logan, Utah, Metro Area), and Pocatello City (Bannock County).

Nonfarm Wage & Salary Employment: Persons on nonfarm establishment payrolls (including employees on paid sick leave, paid holiday, or paid vacation) who work or receive pay for any part of the week including the 12th of the month. It is a count of jobs by place of work. It does not include self-employed, unpaid volunteer or family workers, domestic workers in households, military personnel and persons who are laid off, on leave without pay, or on strike for the entire reference period.

Nondurable Goods: Also known as “soft goods” because they include items manufactured or provided by wholesalers that generally last for only a short period of time (three years or less).

Seasonally Adjusted: Data is seasonally adjusted to remove the impact of regular events that occur at the same time every year such as the effect of cold weather on outdoor activities, the Christmas holiday, or the summer influx of youth into the labor market.

Unemployed: Those individuals, 16 years of age or older, who do not have a job but are available for work and actively seeking work during the week including the 12th of the month. The only exceptions to these criteria are individuals who are waiting to be recalled from a layoff and individuals waiting to report to a new job within 30 days—these, too, are considered unemployed.

Unemployment Insurance: Unemployment Insurance is a program for the accumulation of funds paid by employers, to be used for the payment of Unemployment Insurance to workers during periods of unemployment which are beyond their control.

Unemployment Rate: The number of persons unemployed expressed as a percentage of the labor force.

Weekly Benefit Amount: The amount payable to a claimant for a compensable week of total unemployment.

Weeks Claimed: The number of weeks that unemployed workers claimed Unemployment Insurance benefits.

Weeks Compensated: The number of weeks for which compensation was actually paid.